




Contract Management System Logging a Claim – Step 1

This document provides step-by-step instructions on how to log a claim in the Contract Management System (CMS) for an approved contract.

For easy and convenient claiming, claims can be submitted online. To submit an Expenditure (EXPEN) claim or Advance (ADV) claim via CMS, you must first log a claim into the system by following the instructions below.

Note: Claims may be logged by any CMS user associated with a particular contract, except for read-only roles.

A claim can only be electronically signed by the CLAIMSIG. See “Signing an Online Claim – Step 3” for signature instructions.

STEP	DISPLAY
1. Log into CMS with the correct role.	
2. Select “Claim” from the main menu under the “Log Screen” section.	

3. Locate the contract with the corresponding contract period and select “Log” from the “Action” column.

Contract List						
Contract #	Award #	Amount	Contract Term	Contract Period	Status	Action
C028211		\$1,000.00	01/01/2017 - 01/01/2018	01/01/2017 - 01/01/2018	Approved	Log
C028215	50000	\$50,000.00	07/09/2018 - 07/09/2019	07/09/2018 - 07/09/2019	Approved	Log
C028216		\$500,000.00	07/10/2018 - 07/10/2019	07/10/2018 - 07/10/2019	Approved	Log
C028217		\$2,000.00	07/10/2018 - 07/10/2019	07/10/2018 - 07/10/2019	Approved	Log
C028218	TEST04	\$10,000.00	01/01/2017 - 12/31/2017	01/01/2017 - 12/31/2017	Approved	Log
C028219	SFSDa01	\$10,000.00	01/01/2017 - 12/31/2017	01/01/2017 - 12/31/2017	Approved	Log
C028220	SFSDA01	\$10,000.00	01/01/2017 - 12/31/2017	01/01/2017 - 12/31/2017	Approved	Log
DATA002		\$100,000.00	01/01/2017 - 12/31/2017	01/01/2017 - 12/30/2017	In Process	Log
DATA003		\$100,000.00	01/01/2017 - 12/31/2017	01/01/2017 - 12/31/2017	In Process	Log
C028221		\$700,000.00	08/15/2018 - 12/15/2018	08/15/2018 - 09/15/2018	Approved	Log
C028222		\$10,000.00	06/24/2014 - 06/24/2014	06/24/2014 - 06/24/2014	Approved	Log

4. Complete the necessary details as required by the claim type (Expenditure or Advance) and select “Save”.

A message will appear in the upper right corner of the screen, “Claim successfully logged”.

You have successfully logged your claim and the claim now becomes a task in your “CMS Inbox”. CMS tasks are role based and can only be processed by users logged in with the user role assigned to a particular stage. See below for further instructions on how to proceed based on the user role you are currently logged in with.

Expenditure Report Log

Contract Details

Contract #: C028262
Contractor: WOODCHUCK LODGE
Contract Period: 10/1/2019 To 10/19/2025

Claim Details

Claim Type: Expenditure
Ref/Invoice #: C028262
Date Received: Date Logged: 02/14/2023
Claim Period: To
Amount: \$

Date created: 09/06/22

Printed copies are for reference only. Please refer to the electronic copy for the current version.



5. If you are currently logged into CMS with the correct user role to complete the first review stage of the task*, select “Next”. If not, proceed to Step 6.

Expenditure Report Log Claim successfully logged

Contract Details

Contract #: C028262
Contractor: WOODCHUCK LODGE
Contract Period: 10/1/2019 To 10/19/2025

Claim Details

Claim Type: Expenditure
Ref/Invoice #: C028262
Date Received: Date Logged: 2/14/2023
Claim Period: 10/01/2019 To 10/01/2019
Amount: \$ 1

You are now ready to process your claim.
See “Processing a Claim – Step 2” for further instructions.

6. If you are not currently logged into CMS with the correct user role, you must log out of CMS and log back in with the appropriate user role assigned to complete the task.

Once logged back into CMS (with the appropriate user role), you may proceed by going back into your “CMS Inbox” to locate the transaction.

User Role Information

For auditing and review purposes, most expenditure schedules contain two contractor review stages, a CONUSER stage and a CLAIMSIG stage. Some schedules have only one CLAIMSIG role.

* If the schedule is set up with only one CLAIMSIG role, there will be only one review stage.

If you have questions regarding the appropriate user role required, please contact your program manager.